ADDING PARTIES TO THE CM/ECF DATABASE
INSTRUCTIONS FOR ATTORNEYS
Rev. 5/27/09

Consistency is critical when entering party names into the computer.

Party names (taken from the caption of the case opening document) are entered in various fields of the ECF database (i.e. last name, first name, middle initial, party text, alias, etc.). The instructions below explain how you should enter names in these fields.

FIELD/RECORD DESCRIPTIONS

The following basic guidelines must be used when entering party information:

1. **LAST, FIRST, MIDDLE, GENERATION** - *USED FOR **ALL** INDIVIDUALS*. The last name field is also used for businesses or organizations. The last name field contains sixty characters. We are not using the Title field. Titles should be indexed in the party text.

2. **PARTY TEXT** - *USED AS DESCRIPTIVE TEXT ABOUT THE POSITION OF A PARTY IN A CASE* (i.e. o/b/o him/herself & all those similarly situated; Admin Est of John Doe; o/b/o minor child, etc.). It appears after the name on the cover of the docket sheet. A party can have a different party text record for each case; it is specific to that case. It can be changed/added for each case at any time.

3. **ALIAS** - *USED FOR ALL ALIAS NAMES FOR A PARTY* (aka, dba, etc.). It appears after the party text information on the caption of the docket sheet.

GUIDELINES

1. **ADDING NEW PARTIES** - Before adding a new party into the database, **search to be sure the party is not already there!**

2. **ABBREVIATIONS**:

    a. NEVER abbreviate the first word of the party name, including states. The only exception to this rule is United States of America is abbreviated "**USA**".

    b. ALWAYS use the two letter postal abbreviation for all states except when the state is the first word in the last name field.

c.   When abbreviating, use only the approved standard abbreviations. **DO NOT USE A PERIOD WITH THE EXCEPTION OF JR./SR. AND FIRST, MIDDLE OR LAST NAME INITIALS.** If party is listed only by initials, enter last name initial in last name field and first name initial in first name field. Any additions to the standard abbreviations list must be approved by the ECF System Administrator.

3.   ALWAYS omit the articles **A, AN,** and **THE**.

4.   ALL titles (**Ms**, **Miss**, **Mr**, **Mrs, Dr, Sgt, Col)** should be entered in party text.

5.   **SPACING**:

a.   Do not space or use periods if the title of a company contains capital letters.
(Example: FDIC, AAA Asphalt Co, JJ Jones & Son)

b.   Do not space between letters or between the ampersand in company names if the company name contains capital letters.
(Example: A&P, SAM&B Co)

6.   **MISSPELLINGS**: For public officials only, enter the correct spelling of the individual's name if the Complaint has a typographical error.

STANDARD INDEXING

1. **AGENCIES**: If the head of the department is named in his capacity as the department head, index the name of the department head in the <u>party text</u> record (Example A). If both the department and the head of the department are named as separate parties, index each separately (Example B). If the department head is named but the agency is not named, index the name of the person and put their title in the party text (Example C).

<u>EXAMPLE A.</u> The complaint names the following party:

John Smith, Secretary, Department of Agriculture

Index as follows:

Last Name	**First Name**
Agriculture	Dept of

Party Text: John Smith, Sec

<u>EXAMPLE B</u>. The complaint names the following parties:

Department of Agriculture
John Smith, Secretary, Department of Agriculture

Index as follows:

Last Name	**First Name**
Agriculture	Dept of

Last Name	**First Name**
Smith	John

Party Text: Sec

<u>EXAMPLE C</u>. The complaint names the following party:

John Smith, Secretary

Index as follows:

Last Name	**First Name**
Smith	John

Party Text: Sec

2. **CITIES & TOWNS**: Cities & Towns are indexed before the department name in the last name field only. If 'Connecticut' is listed following the cities or towns, omit it. If a city or town is a named party, index the name of the town in the last name field with "Town of" or "City of" in the first name field.

DO NOT ADD ANY CITY OR TOWN TO THE DATABASE.

Last Name	First Name
Enfield	Town of
Suffield Bd of Ed	
New Haven Police Dept	

3. **INDIVIDUAL/OFFICIAL CAPACITIES**: Index the name of the individual as usual. Indicate the capacity in the party text record.

Last Name	First Name	Party Text
Walsh	John	Police Ofcr, Htfd, I/O

4. **ESTATES/ADMINISTRATORS/EXECUTORS:** Index the executor or administrator in the last, first, middle and generation fields with the descriptive information in the party text record as follows (If a party is listed individually as well as an administrator or executor, index the party ONLY **once** and note "I/O" as the capacity in the party text):

Last Name	First Name	Party Text
Smith	John	Exec Est of Mary Smith
Brown	Betty	Admin Est of John Brown, I/O *(named individually **and** as an administrator)*
Williams	Jane	Est of

5. **MINORS/TRUSTEES**: Index the name of the individual as usual. Enter the descriptive information in the party text record.

Last Name	First Name	Party Text
Smith	Elaine	ppa A.S., a minor
Smith	Susan	Trustee Est of Sam Smith
Jones	Betsy	o/b/o minor child, J.S.
J.	K.	by & through his parents/next best friend, John Smith

6. **GENERATIONS**: Index the name as usual. Enter the generation (Jr., Sr., III) in the generation field using periods as necessary.

7. **UNIONS & FUNDS**: Index under the name of the pension fund in the last name

field. Index the fund under the type of fund:

Last Name	Party Text
Plumbers & Pipefitters Health Fund Local 713	Local 959 Trustees, Plumbers & Pipefitters, Local 959

8.   **RECEIVERS/LIQUIDATORS**: Index under the name of the Company with the name of the receiver/liquidator in the party text:

Last Name	Party Text
Hartford Ins Co	Carol James, Rec
Family Guaranty Life Ins Co	Mississippi Comm of Ins George Dale, as liquidator